

**KANTAR**



# What makes UAE F&B consumers tick?

MADE WITH CARE research

Phase 1: Discover UAE F&B

October 2021



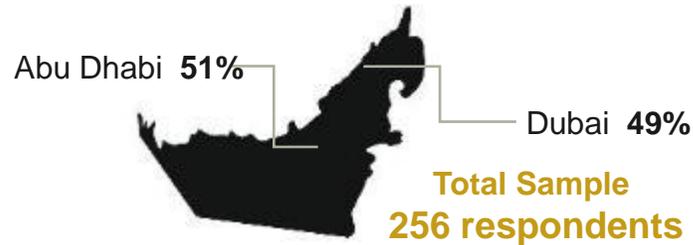
# Methodology and target audience for the research:

## METHODOLOGY

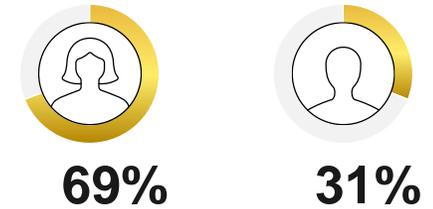
Using selective fieldwork sampling **face to face Computer Aided Personal Interviews (CAPI)** in locations convenient to the respondent.

The interviews were conducted in Arabic or English language with a duration of about 20 minutes.

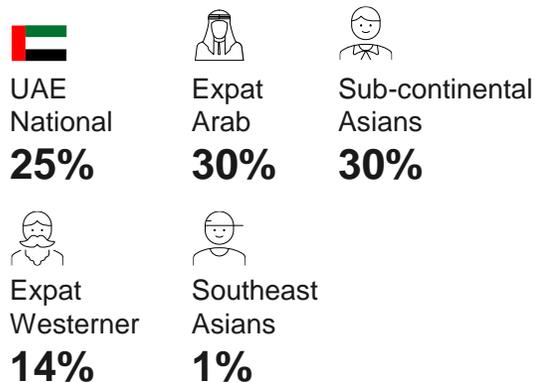
## CITY OF RESIDENCE



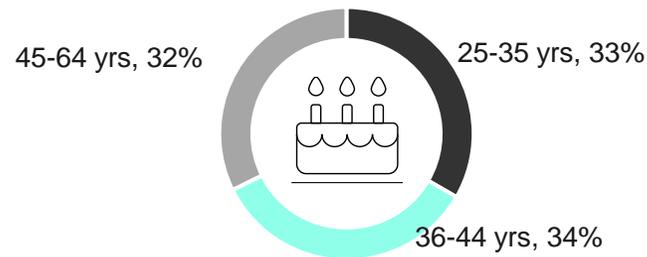
## GENDER



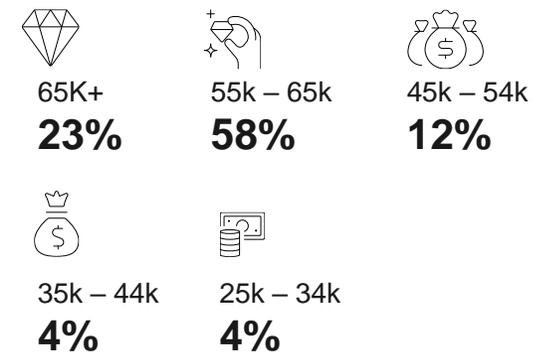
## NATIONALITY



## AGE IN YEARS



## HOUSEHOLD INCOME



All figures in %

# 6 out 10 shoppers recognize **New Zealand** as a supplier for premium products



## Total Shoppers Awareness



**61%**

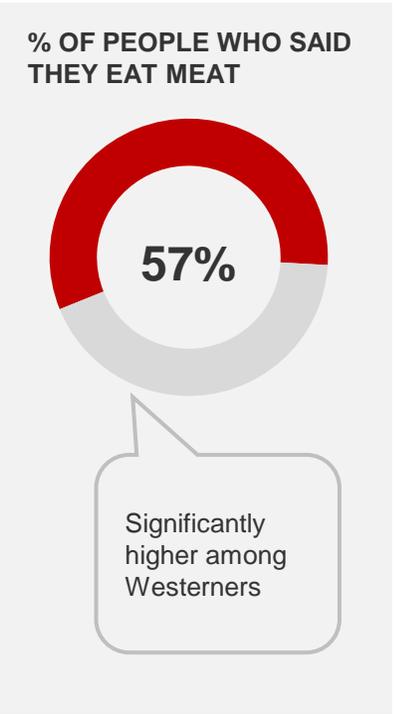
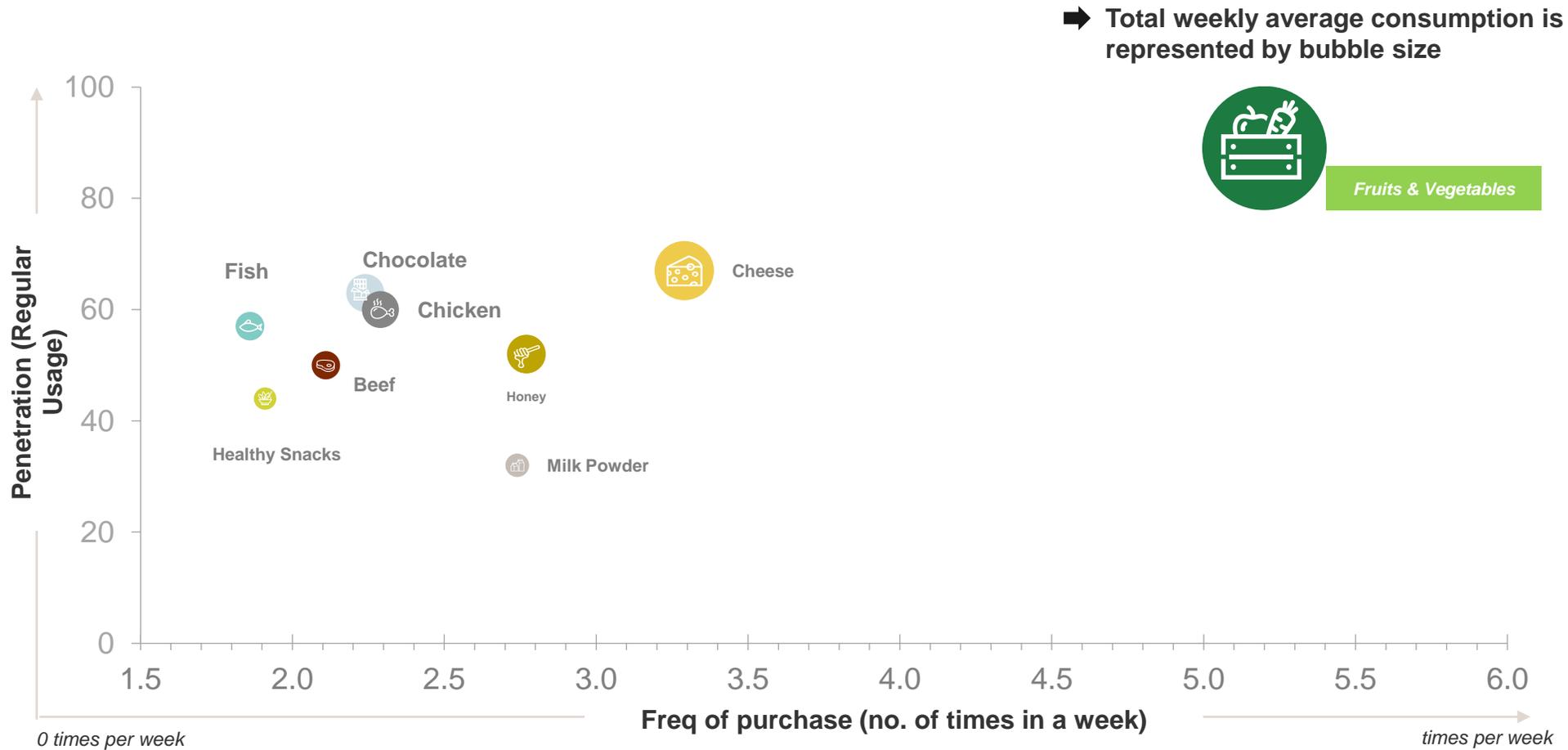
Research conducted with Ipsos in 2018 put this at 40%. Although a different methodology was used, this is still representative of an overall positive growth trend.

						
Australia	USA	UK	<b>New Zealand</b>	France	Italy	Spain
86%	79%	64%	<b>61%</b>	59%	56%	54%

Base:256  
All figures in %



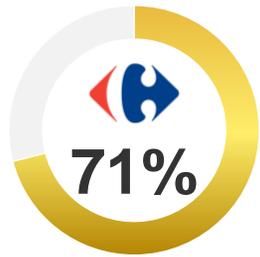
# Although 57% of consumers eat meat; fruits and vegetables are the most frequently consumed F&B category



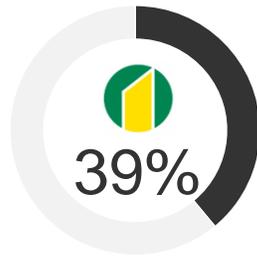
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# Carrefour is the most frequented retailer, followed by Spinneys and Lulu

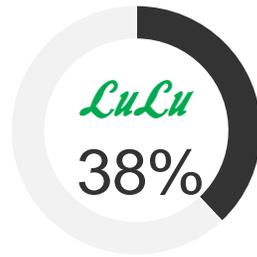
## Top retailers for grocery shopping



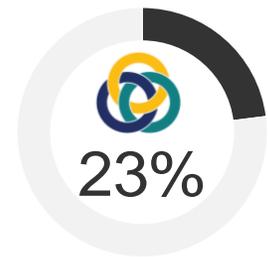
Carrefour



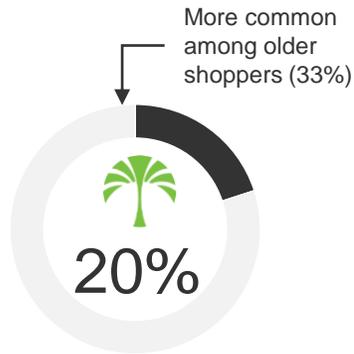
Spinneys



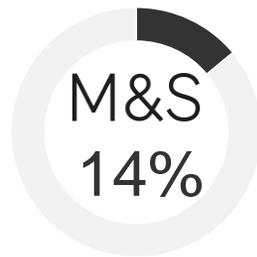
Lulu



Union Coop



Abu Dhabi Coop

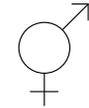


Marks & Spencer

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## Profile of Carrefour Shoppers

### Gender



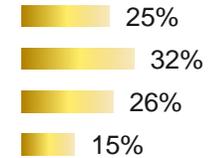
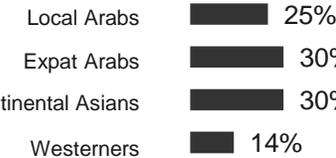
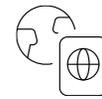
Overall n=256



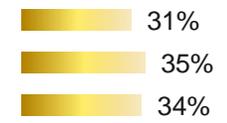
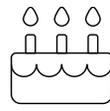
n=182



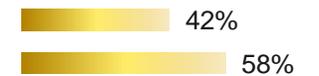
### Nationality



### Age



### Location in UAE



Base:256

All figures in %

# 4 out of 10 shoppers have purchased groceries online – a majority of these were Asians. Noon is the biggest e-tailer followed by Carrefour

## Online grocery shopping

**39%**  
Purchased  
Grocery  
Shopping online

majority  
Asians, 72%



Online retailer used	Overall Base: 101	Dubai Base: 52	Abu Dhabi Base: 49
noon	46%	48%	43%
Carrefour online	36%	44%	27%
amazon	31%	29%	33%
Spinneys	24%	17%	31%
ROW	18%	29%	6%
LuLu	17%	10%	24%
talabat	16%	21%	10%
Waitrose	9%	10%	8%
Choithrams	9%	4%	14%
InstaShop	8%	0	16%

Base:256

Base:101  
All figures in %

# Shoppers are willing to choose premium products and pay more for quality F&B, they focus on **product quality, health and taste when selecting products**

## F&B shopping behavior



**93%**

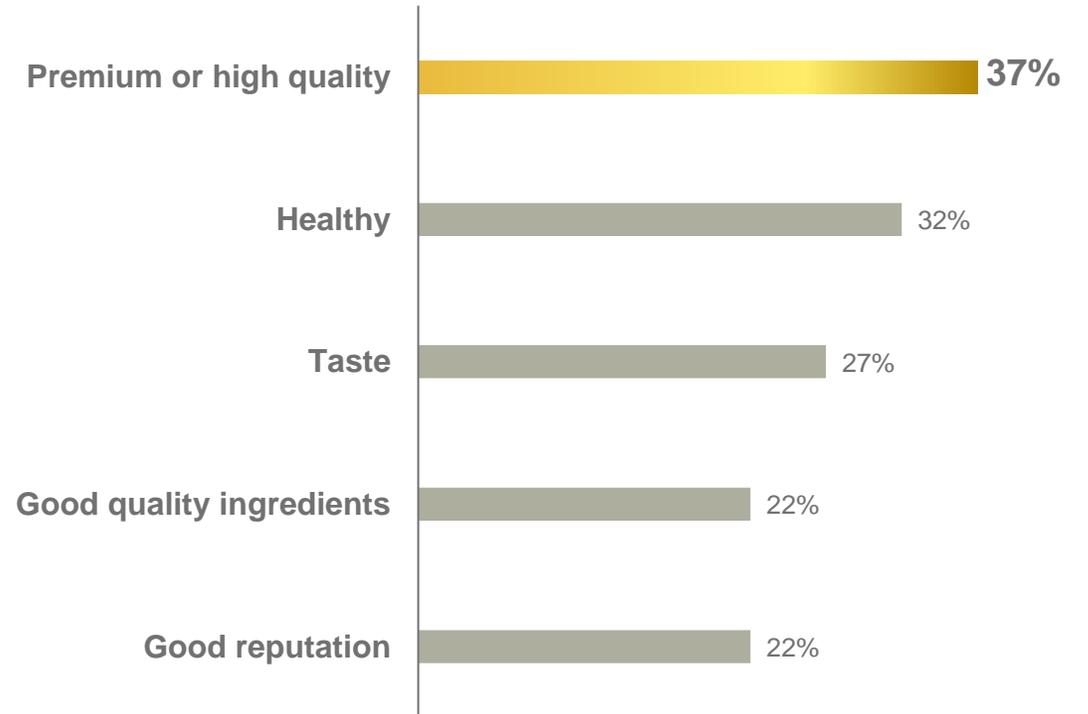
Choose premium products



**70%**

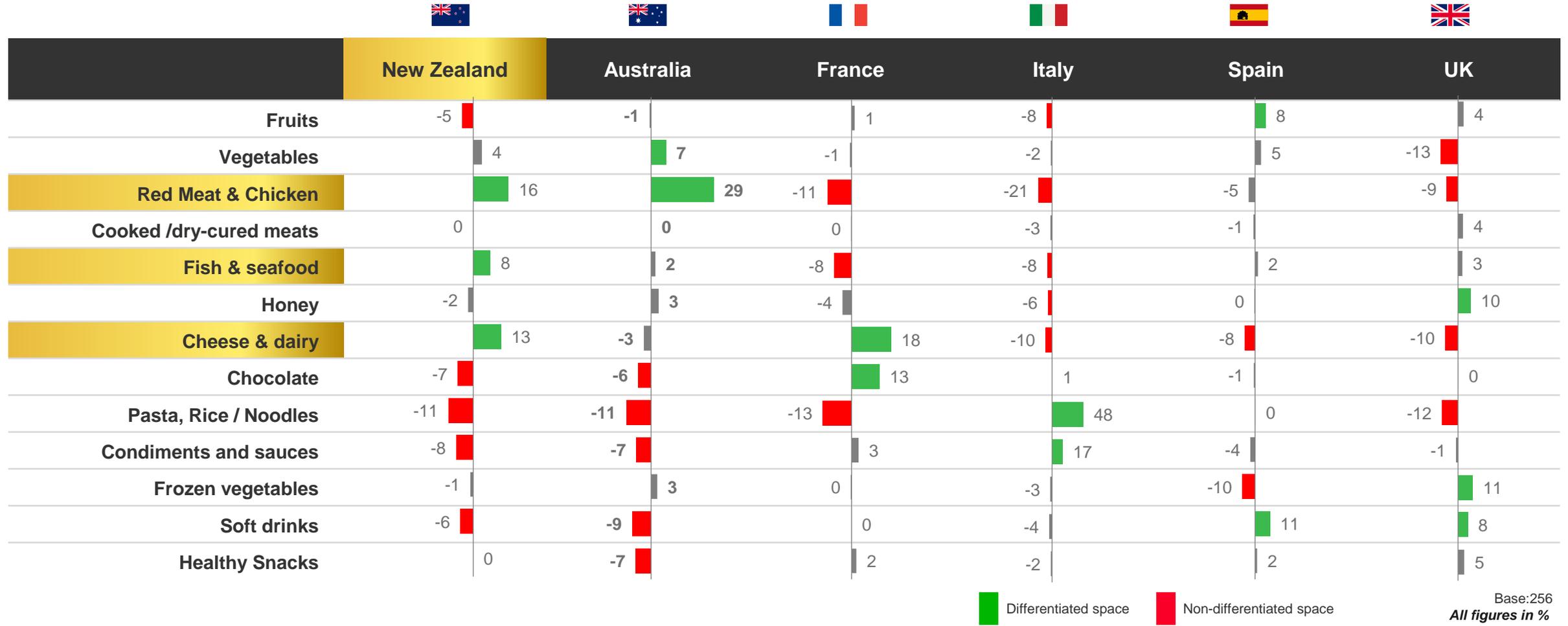
Willing to pay more for quality food and beverage

## Top Factors for product selection



Base:256  
All figures in %

# Currently, New Zealand is most well known for its **meat & poultry** along with **cheese & dairy products** and **fish & seafood**.



# New Zealand is relatively **perceived as safe & trustworthy**, with high-quality, but **expensive** F&B products

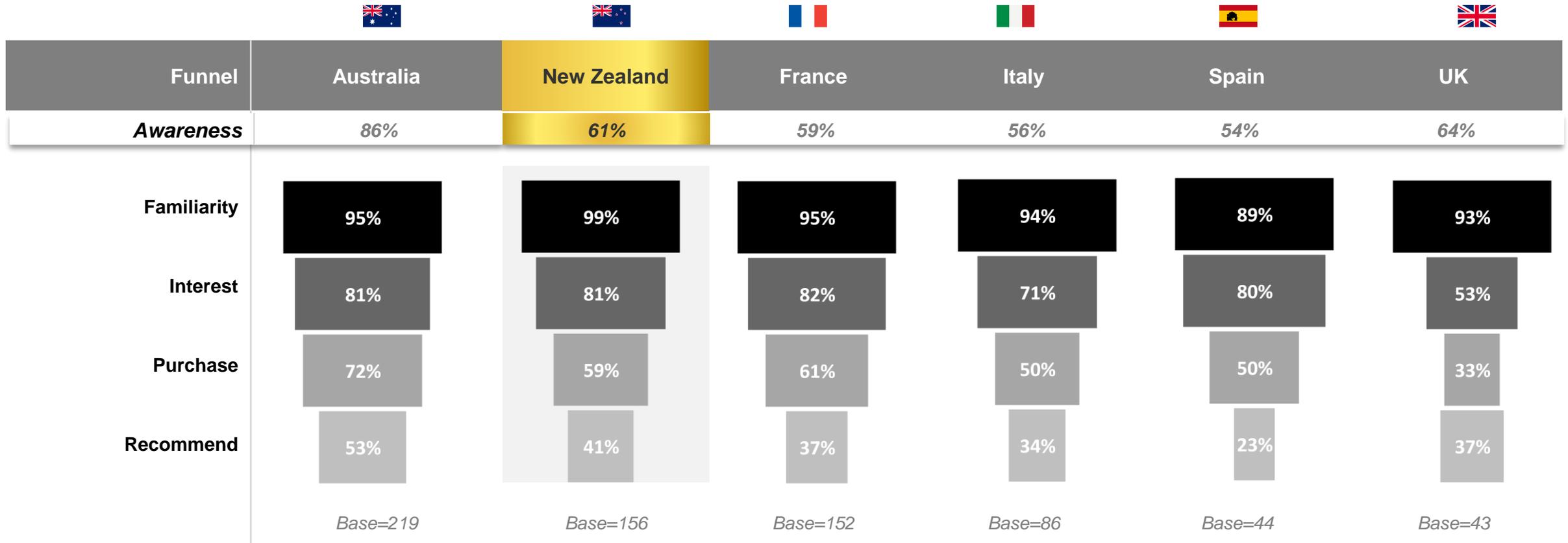
	 New Zealand	 Australia	 France	 Italy	 Spain	 UK
Create Great-tasting Products	0	0	-1	1	0	1
Has Stringent Food-hygiene Standards & Practices	0	-3	-1	1	2	1
<b>Safe &amp; Trustworthy</b>	4	-2	-4	-2	0	4
Nutritious	-3	-1	-2	-3	5	3
World Leaders In Food Innovation	-4	3	5	-3	-2	1
Healthy	2	2	-4	2	-1	-2
Ethical Food Production & Animal Welfare Standards	-2	1	0	-2	-1	3
Cares About Sustainability	-2	3	1	0	0	-3
<b>Produce High-quality F&amp;B</b>	3	1	-7	0	3	0
Good Value For Money	-5	-2	4	0	-3	5
Natural & No Additives	-1	1	-2	-2	1	4
Worth Paying More For	2	0	5	-1	-2	-4
<b>Has Expensive Food Products</b>	4	-3	6	5	-3	-9
World Leaders In Producing Premium Quality F&B	1	-1	0	2	1	-4

\* Associations are based on the Normalization Analysis (both row and column average)

 Differentiated space  Non-differentiated space

Base:256  
All figures in %

# Within those aware of NZ F&B, NZ sees **healthy conversion from “familiarity” to “recommend”**, second only to Australia



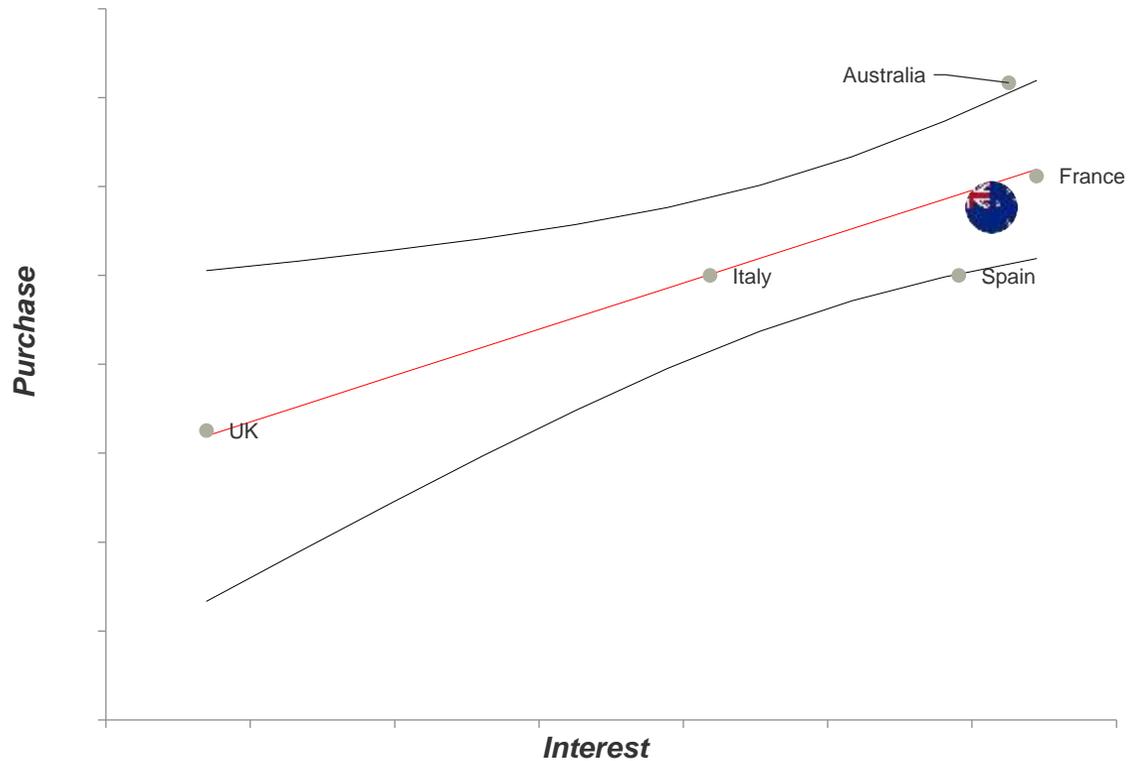
**Note:** Within the set of respondents that are aware of NZ F&B, the graph above shows the conversion funnel from familiarity => advocacy. Of the 256 sample, 156 respondents said they're aware of New Zealand food & beverage (comparable to France).

Base:256  
All figures in %



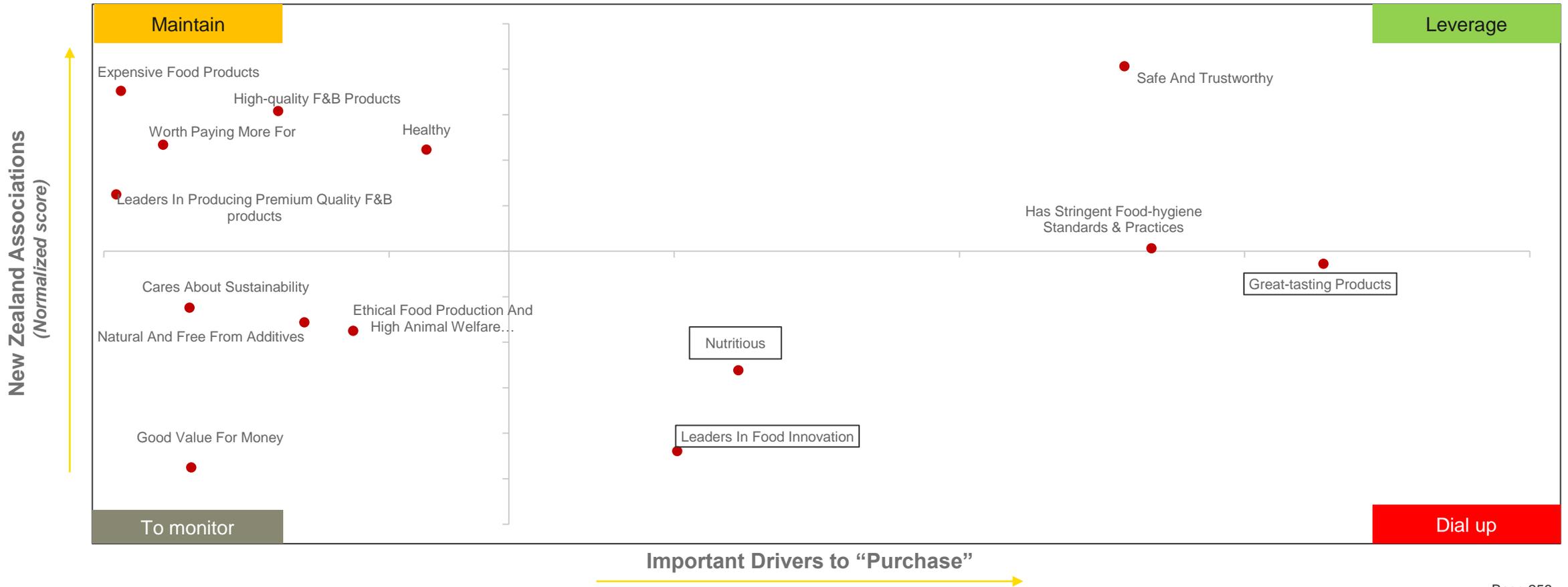
# For New Zealand, the opportunity is to keep building awareness but also dial up purchase among those who are interested

## Purchase conversion



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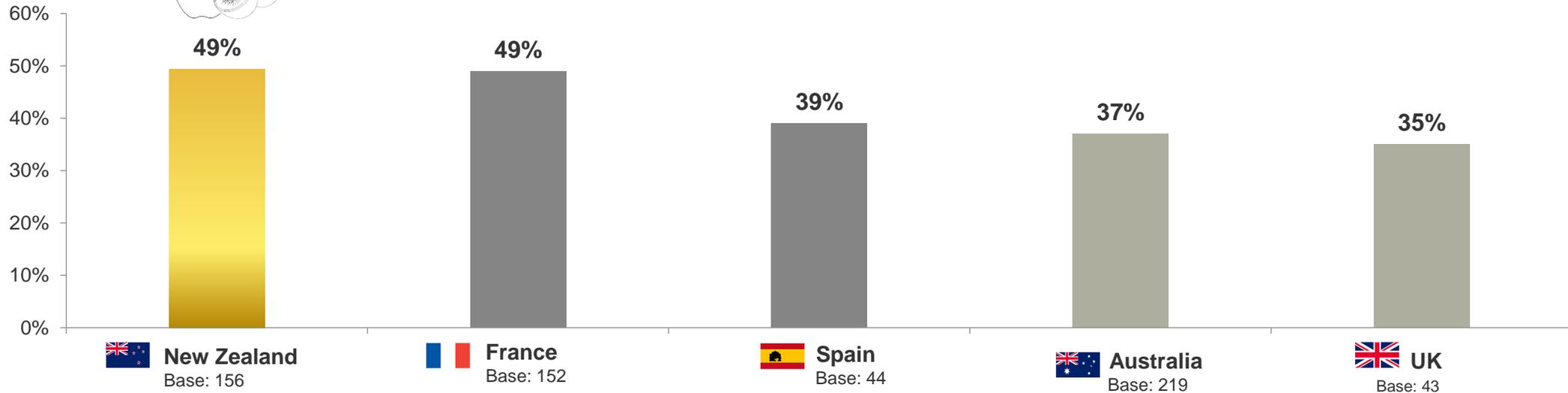
# Focus on dialing up perception around **taste, nutrition and being the leader in food innovation**, while continuing to **leverage current strengths**



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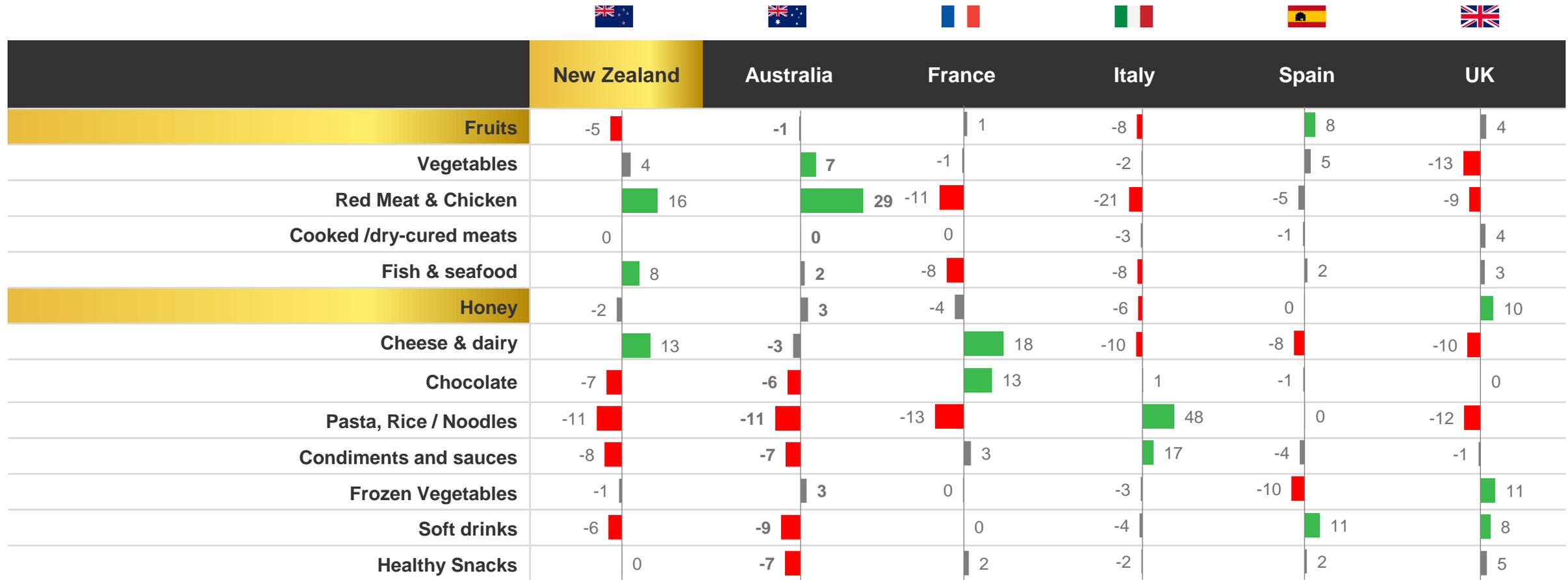
# Opportunity: New Zealand has the **highest purchase consideration** (with France) for Fruit compared to other countries

Consumers surveyed are open to trying New Zealand fruits, there is an opportunity to use marketing campaigns to increase purchase of NZ fruits in the UAE.



Base:256

# There is also an opportunity to focus on **increasing consumer familiarity** for Honey and Fruit

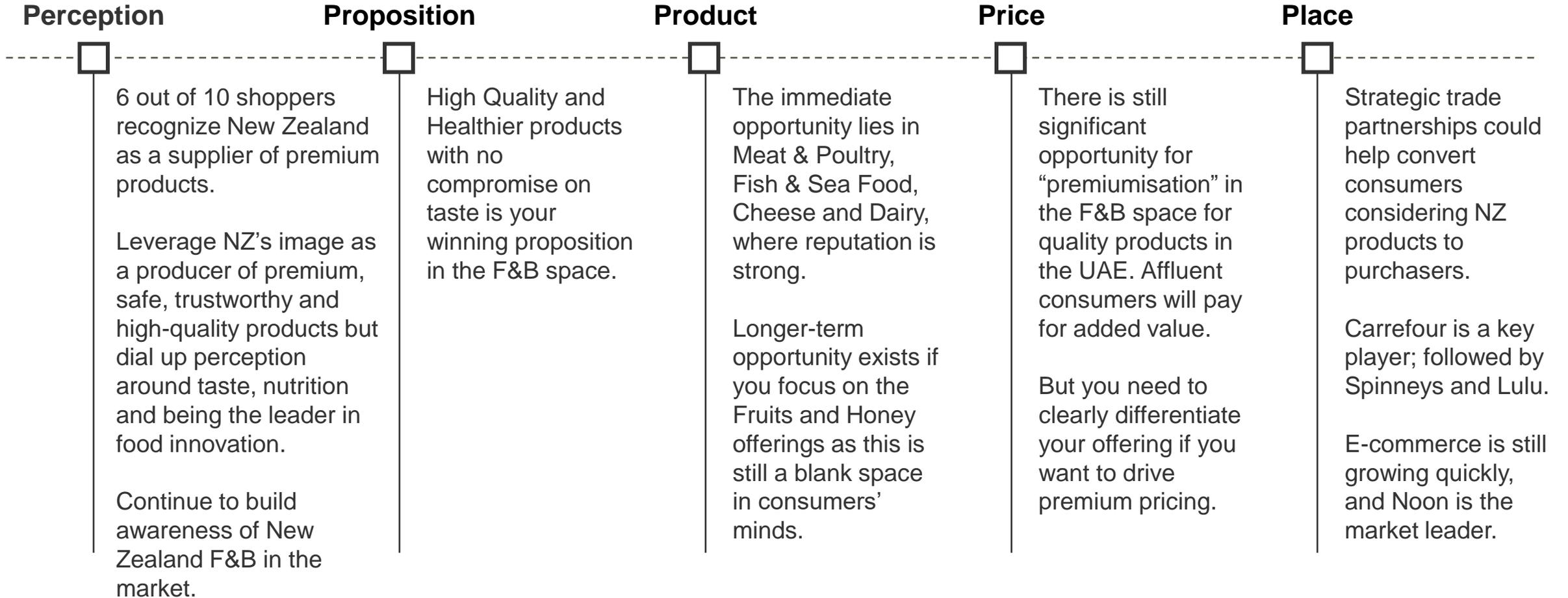


Identified white space in consumers minds

 Differentiated space  Non-differentiated space

Base:256

# What should be the winning strategy across the 5 Marketing Ps?



Thank you

